

Consulting is defined as a temporary relationship to provide assistance to a person, group, organization or community wanting to build their capacity, accomplish a task or achieve a goal.

From Lukas, C.A. (2001) *Consulting with Nonprofits: A Practitioner's Guide*. Saint Paul, MN: Amherst H. Wilder Foundation.

General Process for Working with a Consultant

- Selection process
 - Internally, clarify the project's scope and the consultant's role (be specific)
 - Send Request for Proposal (RFP) to potential consultants
 - Review proposals & eliminate those not to be considered
 - Check references of those to be considered
 - Learn from former clients about the individual's style and approach
 - Hold interviews with candidates – clarify approach & style; will s/he provide what you need?
 - Make your selection
- Internal conversations prior to first meeting with a consultant
 - Ensure you have involved the proper people from your organization
 - Discuss expectations of those involved
 - Discuss the time table
 - Develop a desired outcome
- Initial meeting
 - Provide background information – don't hold back
 - Exchange any necessary information to give a better synopsis of the problem or issue (documents, potential roadblocks, etc)
 - Learn from the consultant
 - Lay out a tentative plan
 - Schedule the next meeting
- Maximize the experience
 - Do what you say you will
 - Communicate progress periodically to all stakeholders
 - Work with, not against, the consultant
 - Be open to develop and try new solutions
 - Enjoy the work
 - Appreciate the outside perspective
 - Don't think of the consultant as staff
 - Avoid "scope creep" – keep focused
 - Stick to the written agreement
 - Offer feedback to the consultant